

## San Bernardino BHMIS Phase I End User Training Agenda

CalPM ADT - DBH SUD		
Date:	TBD	
Course Instructor:	TBD	
Duration:	2 Days	
Super User Attending:	TBD	
Location:	TBD	
Roles required to complete:	INSERT ROLES HERE	
Objective		
Objective:		
DAY 1 DATE Time: 8:00AM – 4:30PM		
EST. START/END TIME	TOPIC	NOTES
8:00 – 8:45	<b>Avatar Basics</b> Logging In and Out Navigation of Home View My Forms Clients Widget Navigation of Chart View	
8:45 – 9:15	<b>Initial Contact Log Bundle</b> Call Intake Initial Contact Log Assign Permanent MR #	
9:15 – 9:45	<b>Hands On Time</b>	
9:45 – 10:00	<b>BREAK</b>	
10:00 – 11:00	<b>SUD Registration Bundle</b> Admission (Outpatient) CalOMS Admission Emergency Contact Information Client Contacts <b>SUD Admission Bundle</b> Diagnosis Sexual Orientation and Gender Identity (SOGI) <b>Financial Bundle</b> Financial Eligibility Fast Financial Eligibility Real Time Inquiry (270) Request	*Possible SUD Financial Bundle
11:00 – 12:00	<b>CalOMS Administrative Discharge</b> Discharge Cal-OMS Administrative Discharge	
12:00 – 1:00	<b>Lunch</b>	
1:00 – 2:00	<b>Hands on Exercise &amp; Open Discussion</b>	Time to be used for staff to practice and

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	(Review of SUD Bundle and CalOMS Admin Discharge)	discuss changes in workflow.
2:00 – 2:45	<b>CalOMS Standard Discharge</b> Discharge Cal-OMS Discharge	
2:45 – 3:00	<b>Break</b>	
3:00 – 3:45	<b>CalOMS Youth Detox Discharge Bundle</b> Discharge Cal-OMS Youth Detox Discharge	
3:45 – 4:00	<b>Client Update Bundle</b> Update Client Data Financial Eligibility Client Condition Pregnancy	
4:00 – 4:30	<b>Hands on Exercise &amp; Open Discussion</b>	Time to be used for staff to practice and discuss changes in workflow.
<b>DAY 2</b> <b>DATE</b> <b>Time: 8:00AM – 11:45AM</b>		
Estimated Start/End Time	Topic	Notes
8:00 – 8:30	<b>Review of Day 1</b>	
8:30 – 9:00	<b>Review of SUD Admission and CalOMS Admin Bundles</b>	
9:00 – 9:45	<b>Ancillary/Ambulatory Services</b> Client Charge Input Recurring Client Charge Input Edit Service information • Emergency Indicator	
9:45 – 10:15	<b>Client Ledger</b> Simple Report Crystal Report	
10:15 – 10:30	<b>Break</b>	
10:30 – 11:45	<b>Scheduling Calendar</b> Add Appointment Find New Appointment Find Existing Appointment Scheduling Individual Appointments Rescheduling of Appointments Editing Appointments Creating Groups Scheduling Group Appointments Appointment Management Appointment Move/Delete	
11:45 – 12:00	<b>Hands on Exercise &amp; Open Discussion</b>	

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12:00 – 1:00	<b>Lunch</b>	
1:00 – 2:00	<b>Review of Morning</b>	
2:00 – 2:30	<b>Scheduling Reports</b> Print Practitioner Reports Print Appointment Reminder Print Schedule	
2:30 – 3:00	<b>Group Management</b> Group Member Listing Edit Group Registration Date Delete Group Termination	
3:00 – 3:45	<b>Crystal Reports</b> MediCal Eligibility Roster (MHS134) Client Face Sheet (MHS140) Reporting Unit Service Summary (MHS142) Missing Social Security Number Staff Caseload Summary (MHS206A) Program Caseload Summary (MHS206B) Medicare Clients with Current Open Episodes (MHS560) Absence of Service Report (MHS119) Client Registration Analysis (OSO114) Client Coverage Status (MHS873) Direct Service Detail Report Input Verification Monthly Client Charges Report (MHS941) Clinic Morning Report (MHS942) Monthly Admit Discharge Summary (MHS941) Patient Financial Information (PFI) Indirect Services Report (PSP104) Client Registration (PSP114) Activity Analysis (PSP117) Program Caseload (PSP121) Service Summary: Direct and Indirect Services Service Entry Performance Report (PSP138) Primary Staff Active Caseload(SBC100)	
3:45 – 4:30	<b>Hands on Exercise/Wrap Up</b>	

### Specific Training Notes for this Course

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